

Self Service – Government Travel Charge Card

Overview

Introduction This guide provides the procedures for a member to view their Travel Charge Card data as well as their Travel Charge Card balance.


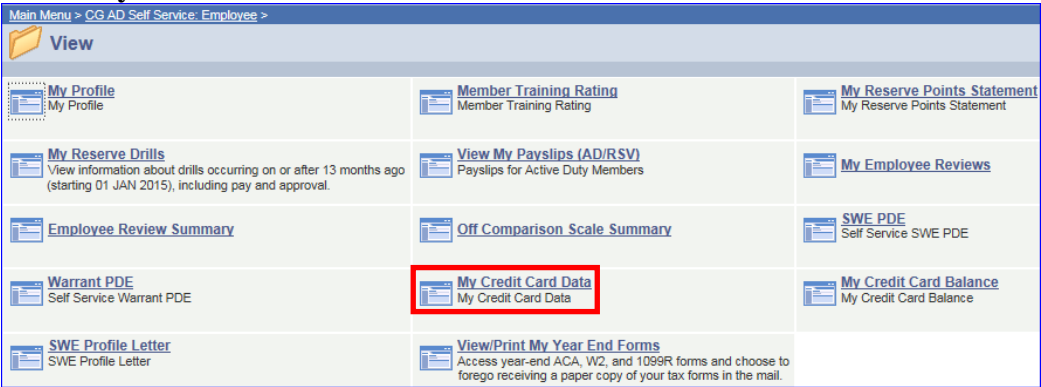
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Self Service – My Credit Card Data

Introduction This guide provides the procedures for a member to view their Travel Charge Card data in Direct Access.

Procedures See below.

Step	Action
1	<p>Select the 5 More... link from the View column of the Employee pagelet.</p>  <p>The screenshot shows the 'Employee' pagelet with three columns: Profile, Tasks, and View. The 'View' column contains several links, with '5 More...' highlighted in a red box at the bottom.</p>
2	<p>Select My Credit Card Data.</p>  <p>The screenshot shows the 'Main Menu > CG AD Self Service: Employee >' page. It features a 'View' section with a grid of links. The 'My Credit Card Data' link is highlighted with a red box.</p>

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Self Service – My Credit Card Data, Continued


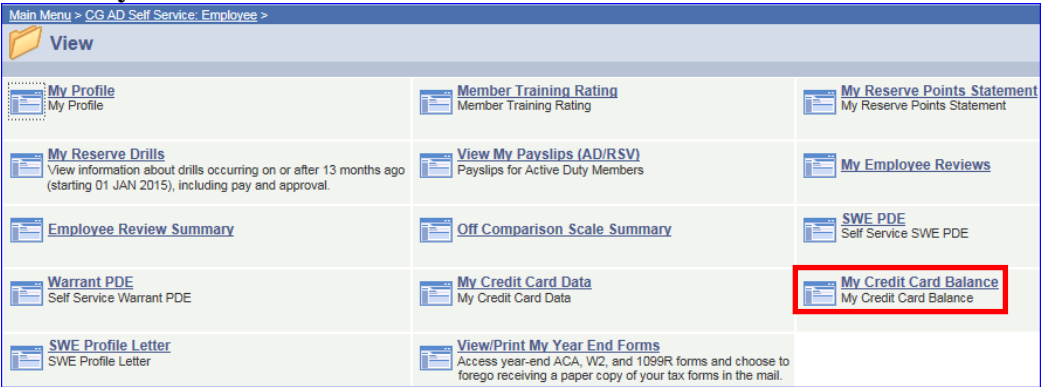
Procedures,
continued

Step	Action																								
3	<p>The Credit Card data will display.</p> <div>Maintain Employee Credit Card <u>Chew Bacca</u> Person ID: 1234567 Credit Card Data Find View All First 1 of 1 Last Business Unit: 00010 Credit Card Vendor: COMON JPMC Card Type: Visa Credit Card Number: XXXXXXXXXXXX6670 Function: Individually Billed Account Issued Date: 10/09/2008 Expiration Date: 11/30/2017 Limit Amount: 1.00 Currency: USD Limit Per Trans: Bill To: Employee Save Return to Search Notify</div> <p>Refer to the table below for descriptions of the data fields.</p> <table><thead><tr><th>Field</th><th>Description</th></tr></thead><tbody><tr><td>Business Unit</td><td>'00010' for Active Coast Guard Units</td></tr><tr><td>Credit Card Vendor</td><td>Name of Credit Card Company</td></tr><tr><td>Card Type</td><td>Type of credit card – MasterCard, Visa, Amex, etc.</td></tr><tr><td>Credit Card #</td><td>Last four digits of the credit card number</td></tr><tr><td>Issued Date</td><td>The date the card was issued in MM/DD/YYYY format</td></tr><tr><td>Limit Amount</td><td>Current credit limit amount. Note: '0' is used to show no limit or a closed account '1' is used when the account hasn't been activated</td></tr><tr><td>Limit Per Trans</td><td>N/A</td></tr><tr><td>Function</td><td>Shows how the account is billed</td></tr><tr><td>Expiration Date</td><td>The date the card expires in MM/DD/YYYY format</td></tr><tr><td>Currency</td><td>The currency type (USD=U.S. Dollars)</td></tr><tr><td>Bill To</td><td>Who the account is billed to</td></tr></tbody></table>	Field	Description	Business Unit	'00010' for Active Coast Guard Units	Credit Card Vendor	Name of Credit Card Company	Card Type	Type of credit card – MasterCard, Visa, Amex, etc.	Credit Card #	Last four digits of the credit card number	Issued Date	The date the card was issued in MM/DD/YYYY format	Limit Amount	Current credit limit amount. Note: '0' is used to show no limit or a closed account '1' is used when the account hasn't been activated	Limit Per Trans	N/A	Function	Shows how the account is billed	Expiration Date	The date the card expires in MM/DD/YYYY format	Currency	The currency type (USD=U.S. Dollars)	Bill To	Who the account is billed to
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4	To return to the Homepage, click on the Home link.																								

Self Service – My Credit Card Balance

Introduction This guide provides the procedures for a member to view their Travel Charge Card balance in Direct Access.

Procedures See below.

Step	Action
1	<p>Select the 5 More... link from the View column of the Employee pagelet.</p>  <p>The screenshot shows a web interface titled 'Employee'. It has three columns: 'Profile', 'Tasks', and 'View'. The 'View' column contains several links, with '5 More...' at the bottom, which is highlighted with a red rectangular box.</p>
2	<p>Select My Credit Card Balance.</p>  <p>The screenshot shows a web interface titled 'View' under the breadcrumb 'Main Menu > CG AD Self Service: Employee >'. It displays a grid of links. The link 'My Credit Card Balance' is highlighted with a red rectangular box.</p>

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Self Service – My Credit Card Balance, Continued

Procedures,
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Step

3

Action

The Credit Card balance(s) will display.

My Credit Card Balance

Chew Bacca

EMP ID: 1234567

Empl Record: 0

Employee Business Expense Time

Find

View All

First

1 of 1

Last

Expense Period End Date:

03/27/2016

Business Expense Details

Customize

Find

First

1-6 of 6

Last

Expense

Dept ID

Charge Date	Expense Code▲	Expense Amount	Currency Code	Business Purpose
03/27/2016	Amount Due	122.64	USD	Open
03/27/2016	30 Days PD		USD	Open
03/27/2016	60 Days PD		USD	Open
03/27/2016	90 Days PD		USD	Open
03/27/2016	91+ Days PD		USD	Open
03/27/2016	Hierarchy		USD	31432

Save

Return to Search

Notify

Continued on next page

Self Service – My Credit Card Balance, Continued

Procedures,
continued

Step	Action												
3 (cont)	Refer to the table below for descriptions of the data fields.												
	<table><tr><th>Field</th><th>Description</th></tr><tr><td>Expense Period End Date</td><td>Date of the Report</td></tr><tr><td>Charge Date</td><td>Date of the Report</td></tr><tr><td>Expense Code and Expense Amount</td><td>A description of the entry for the associated Expense Amount.<ul style="list-style-type: none">• # Days PD is the number of days Past Due. Any expense amount associated with a #Days PD is the previous amount past due and unpaid for the # of Days.• Amount Due refers to the total current amount due.• Hierarchy is the credit card vendor's Reporting Hierarchy Code. There is no associated expense amount for the Hierarchy. The hierarchy code is displayed under Business Purpose.</td></tr><tr><td>Currency Code</td><td>The type of currency (USD=U.S. Dollars)</td></tr><tr><td>Business Purpose</td><td>The account status. Possible values are:<ul style="list-style-type: none">• Open – Account in favorable standing• Suspended – Account is more than 60 days past due• Closed – Account is closed and the bank or card vendors cannot accept any more charges for the accountThe 5-digit number located on the “Hierarchy” line is the credit card vendor's Reporting Hierarchy Code.</td></tr></table>	Field	Description	Expense Period End Date	Date of the Report	Charge Date	Date of the Report	Expense Code and Expense Amount	A description of the entry for the associated Expense Amount. <ul style="list-style-type: none">• # Days PD is the number of days Past Due. Any expense amount associated with a #Days PD is the previous amount past due and unpaid for the # of Days.• Amount Due refers to the total current amount due.• Hierarchy is the credit card vendor's Reporting Hierarchy Code. There is no associated expense amount for the Hierarchy. The hierarchy code is displayed under Business Purpose.	Currency Code	The type of currency (USD=U.S. Dollars)	Business Purpose	The account status. Possible values are: <ul style="list-style-type: none">• Open – Account in favorable standing• Suspended – Account is more than 60 days past due• Closed – Account is closed and the bank or card vendors cannot accept any more charges for the account The 5-digit number located on the “Hierarchy” line is the credit card vendor's Reporting Hierarchy Code.
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Note: Address changes made in Direct Access are not transmitted to JPMC. Notify the bank separately to update an address.													
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